

Buyer User Tips

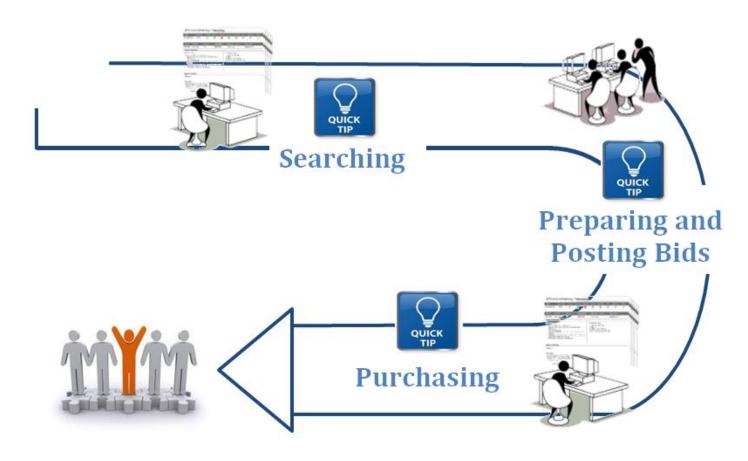




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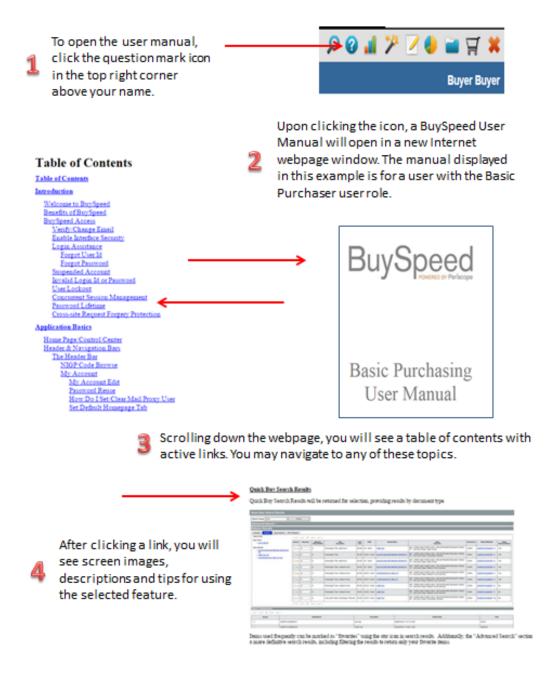
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Tip 1-1

Getting Help in COMMBUYS

When logged into COMMBUYS, buyers have access to an online user manual tailored to specific user roles. The manual provides information on system functionality as well as COMMBUYS terminology.*



^{*} Note that this user manual was developed for BuySpeed, the technology used to build the COMMBUYS system. Therefore, the manual will contain descriptions and screen shots not used in COMMBUYS.



Tip 1-2

Resource for Searching Contracts

Access a search resource available on the OSD website. The **Statewide Contract Index** enables buyers to search for items available on Statewide Contract and identify the associated contract using a key word search. The **Statewide Contract Index** is accessible at **www.mass.gov/osd > Buy From a Statewide Contract > Statewide Contract Index**.

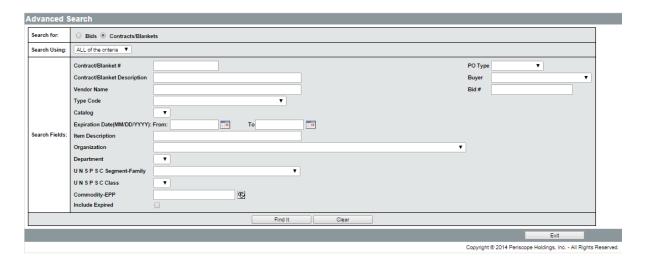
In COMMBUYS, purchasers may use the **Contract Blanket Description** field under the **Advanced Search** icon (magnifying glass) to search and access contract information.



Tip 1-3

Determine If a Vendor is on Contract

In COMMBUYS, select **Contract/Blanket** Search. Using the **Vendor Name** search field, enter all or part of the vendor name. This will return a list of Master Blankets, if any, that contain the selected vendor, except in the case of distributor MBPOs (see below). The **Type Code** column will indicate *SW* for a Statewide contract or *NC* for a Departmental contract.



Important note regarding distributor MBPOs: Some Statewide contracts are set up as multivendor or distributor MBPOs in COMMBUYS. In these instances the main Vendor is the "Conversion Vendor" and all SWC Vendors for the contract are listed as distributors on the Master Blanket. At this time, the search described above will not locate vendors on a distributor MBPO.

Users are advised to use the Contract/Blanket Description or Item Description fields to locate the Master Blankets that may cover the products/services they seek and, if any of them are set up as distributor MBPOs, view the list of distributors for each. Additionally, users may refer to Contract User Guides to view associated vendors on a particular contract. Visit www.mass.gov/osd > Buy from a Statewide Contract > Statewide Contract User Guides.



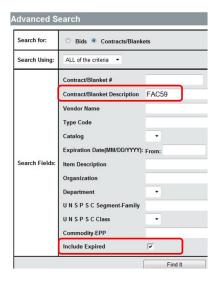
Tip 1-4

Searching for Expired Contracts in the Public View

Users have the ability to view expired contracts from the public view in COMMBUYS.

From the **COMMBUYS.com** landing page:

- Choose Contract & Bid Search;
- Using the Advanced Search feature, select Contracts/Blankets;
- Enter the expired contract number (Ex. FAC59), if known, in the Contract/Blanket Description field or any other search criteria;
- Select the Include Expired check box at the bottom;
- Click Find It





Tip 1-5

UNSPSC Tool for Buyers and Vendors

The Operational Services Division uses United Nations Standard Products and Services Codes (UNSPSC) to classify goods and services in COMMBUYS. Purchasers use these codes when preparing bids and vendors select UNSPSC codes to receive notifications of bidding opportunities that align with their businesses.

OSD has developed an easy-to-use tool to assist both purchasers and vendors in identifying UNSPSC information associated with commodities and services. Users may find the UNSPSC Look-Up Tool and instructions for its use on COMMBUYS.com, as well as the COMMBUYS Resource Center at mass.gov/osd/commbuys > COMMBUYS Resource Center.



Buyer Quote Search

Buyers have the ability to view all quote activity connected with their bid including quotes that were created by vendors but were not submitted or were submitted improperly.

Using **Advanced Search** functionality, buyers should select **Quotes** from the **Document Type** drop-down menu and use the **Quote #**, **Bid #**, **Quote Description**, and/or **Vendor Name** fields for exact or partial match searches.



Please Note:

- Buyers are restricted to searches within their own organization and only will be able to view quotes created for bids to which the buyer has authorization.
- Buyers only may evaluate and score submitted quotes via the Bid Tabulation section in COMMBUYS.
- The search may return a "No Bid" quote. For additional guidance on "No Bid" quotes, see Tip 2-4.



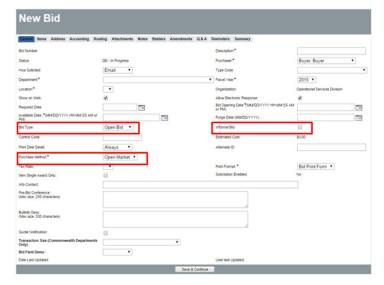
Selecting Purchasing Methods and Bid Types in COMMBUYS

When preparing a bid on the **General Tab** in COMMBUYS, purchasers need to consider whether a PO represents a one-time purchase or if multiple purchases will be made against a Blanket over time.

Open Market is selected to initiate a onetime purchase of non-contract commodities/ services, or a competitive procurement.

Blanket is appropriate to capture contract agreements and allow for the processing of Release Purchase Orders for the life of a contract.

Contract, while an available option in the system, is not used by the Commonwealth.



When creating a bid from scratch, it will default to Open Market and purchasers may adjust as needed. Purchasers that initially selected Open Market are given the option to change the Purchase Method back to Blanket at the time the bid is awarded.

In addition to the purchase methods above, purchasers need to assign an appropriate bid type:

- An Open Bid applies to most bidding/solicitations done by the Commonwealth, and bids in COMMBUYS, therefore, default to Open Bids. Open Bids are available for quotes by all vendors and may be viewed by the public without a login. Purchasers create an open and unrestricted bid when posting a competitive procurement, posting a contract opportunity, or when they initiate a one-time purchase of non-contract products/services. COMMBUYS does not notify vendors of bids matching their business interests automatically. Departments must take appropriate action to notify vendors who registered in COMMBUYS with UNSPSC codes matching the same code(s) used in the bid. The Bidders tab also provides users an option to designate their bids as Restricted or Unrestricted. Purchasers must leave that selection blank or select the Unrestricted bid option.
- A Closed Bid is appropriate in limited circumstances when a public, open bid is not required. For
 example, this option is suitable for issuing requests for quotes against existing Contracts where
 the pool of eligible vendors has been established. When using a closed bid, buyers must take
 action to select vendors/bidders and only those vendors who are specified on the bid will be
 notified and can view and respond.

Selecting Purchasing Methods and Bid Types in COMMBUYS (continued)

- With **Formal Bids**, buyers post the bid, vendors produce sealed quotes, and then buyers may open and read the quotes once the opening date arrives. Prior to the opening date, all quotes are sealed to buyers, but submitting vendors may view, edit, and withdraw their quote any time before the bid opening date. Bids are formal and open by default; no action is required to make them formal. This option should be used for all bids unless they fall under conditions such as the one detailed below for Informal Bids. Formal bids may be Open or Closed.
- With **Informal Bids**, on the other hand, buyers post the bid and vendors respond with quotes that are not sealed and may be viewed by the buyer upon receipt. Informal Bids should be used in more limited circumstances: For example, when soliciting quotes from vendors already on contract. Informal bids may be either Open or Closed.

For additional procurement guidance, visit the <u>Procurement Information Center</u> on the OSD website, www.mass.gov/osd under Key Resources.



Tip 2-2

Understanding UNSPSC Codes

When purchasers are developing bids in COMMBUYS, selecting the appropriate United Nations Standard Products and Services Code (UNSPSC) is a crucial part of the process. The UNSPSC codes associated with the bid ensure that vendors offering goods and services aligned with the bid are notified when the bid is posted. <u>Guidance on UNSPSC codes</u> is available via webcast on the OSD website, **www.mass.gov/osd** > <u>OSD Training</u>.



Tip 2-3

Guidance for Multiple Quotes in Response to a Bid

COMMBUYS will not preclude vendors from submitting multiple quotes in response to the same bid, and 801 CMR 21.00 does not preclude departments from evaluating multiple quotes.

When planning a procurement, the Sourcing Team must decide whether multiple quotes should be accepted and include appropriate language in the RFR document. The standard RFR – Required Specifications document and the recommended RFR Templates, posted on the OSD Forms page*, include language that prohibits submission of multiple quotes and considers the last quote submitted the only valid quote from the vendor unless the RFR specifically states otherwise. If an RFR is silent on the issue of multiple quotes and multiple quotes from the same vendor are received, the department must evaluate all quotes submitted.

^{*} The OSD Forms page is on the OSD website at www.mass.gov/osd > OSD Forms.

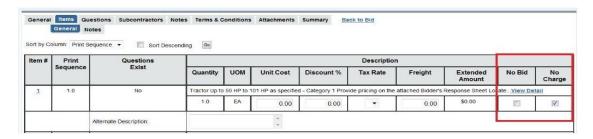


"No Bid" Elections on Quotes Submitted in COMMBUYS

There are two areas where bidders may select "No Bid" as part of their quote submission. These selections by vendors have ramifications for purchasers as they affect bid evaluation and award capabilities.

"No Bid" on an Item

When bidders begin preparing their quotes, COMMBUYS, by default, checks off "No Bid" for every **item**, and bidders must then take action to change "No Bid" to the desired price or "No Charge" for the items they are quoting. The quote can be submitted even if "No Bid" is selected for all items, and the quote will be visible to the purchaser both in the **Quote History** and in the **Bid Tabulation** (Bid Tab). However, the system **will not** allow the purchaser to make an award recommendation for any "No Bid" selected items.



If the "No Bid" selection for an item was submitted in error, the purchaser may allow bidders to revise the quote and change "No Bid" to "No Charge," if the purchaser ascertains that the bidder intended to submit a valid quote. This quote revision is only acceptable if the change is purely clerical, i.e. that the product or service was proposed in an attachment but the proposal was not reflected in the quote item.

To allow this change, the purchaser must send the bidder a "Revision Request," enabling the bidder to make the necessary modification in response to that request.

^{* &}quot;No Charge" is used when pricing details are summarized in the quote attachment or when there is no charge for a particular item.

"No Bid" Elections in Quotes Submitted in COMMBUYS (continued)

"No Bid" on the Entire Bid

Bidders also have the option to select "Is 'No Bid'" on the **General** tab of their quote. This selection is not a default and must be made by the vendor intentionally.



Selection of this check box will allow a bidder to create and submit a quote, and the bid will appear on the purchaser's **Quote History** tab. However, the quote **will not** appear in the purchaser's **Bid Tabulation** (Bid Tab). The system **will not** allow the purchaser to make an award recommendation for any of the items in a quote with "Is 'No Bid'" selected.

It is important that purchasers check the **Quote History** for quotes in which "Is 'No Bid'" was selected in error.



If an "Is 'No Bid'" quote was submitted in error, and the purchaser ascertains that the bidder intended to submit a valid quote, the purchaser may include the "Is 'No Bid'" quote in the evaluation. For evaluation and award purposes, the purchaser may create a new quote on behalf of the vendor by selecting "Create New Quote" on the **Bid** tab. The purchaser selects the bidder from a drop down list, enters the quote submission date, and provides other requested details. Purchasers are advised to reference the bidder's submitted quote number in the **Comments** section of the newly created quote and use the new quote to award the bid.

Reminder: When entering the quote on behalf of the vendor, purchasers are cautioned to select "No Charge" or enter the vendor quoted price under the **Items** tab of the quote.



Email Notifications When Bidders Submit Quotes

Purchasers may elect to receive email notifications when bidders submit quotes. To initiate email notifications, purchasers should select the **Quote Notification** check box on the **General** tab when setting up the bid. This election allows purchasers to preview quote activity against the bid, and cross check the quotes received against the email notifications.

Item Single Award Only:	
Info Contact:	
Pre-Bid Conference: (Max size: 250 characters)	Pre-bid web conference 10/23/14. Bidders planning to atte
Bulletin Desc:	Statewide contract for FAC86 Solid Waste and Recycling
Quote Notification:	₹
Date Last Updated:	01/09/2015 12:27:12 PM



Guidance on Procurement Information to be Included in COMMBUYS

The goal is for Departments to maintain a complete record of any procurement in COMMBUYS irrespective of whether a particular element of the procurement, such as the scoring of submitted quotes, has occurred offline. Examples of procurement information that must be stored online include:

- the initial bid and all related attachments,
- · questions and answers developed through the procurement process,
- submitted quotes,
- the results of the quote evaluation process and scores, and
- contract award results, including copies of signed Standard Contract forms.



Tip 2-7

Controlling What is Visible in COMMBUYS: Guidance for Bid Attachments

Both during contract award in COMMBUYS and when updating an existing contract, Department contract managers have the ability to select which attachments are visible to the public without logging into COMMBUYS. Keep in mind that information and documents associated with public procurements are considered public records whether or not this information is made visible to all COMMBUYS users. Departments also must ensure that any confidential, personally identifiable and/or security-sensitive information is either redacted before being uploaded and/or not visible to COMMBUYS users.

Department contract managers may control the visibility of documents at two points in time, as follows:

- · during the contract award and PO creation process, and
- when attaching a procurement file to a contract in COMMBUYS.

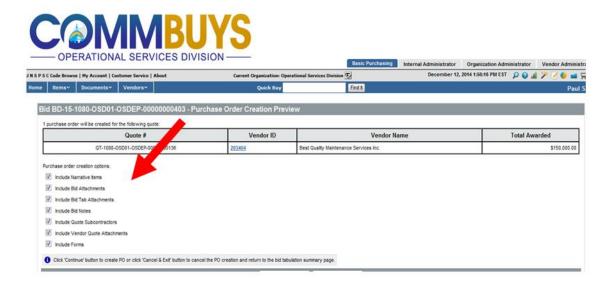
Guidance on the following three pages explain how contract attachments may be managed during these processes.

Controlling What is Visible in COMMBUYS: Guidance for Bid Attachments (continued)

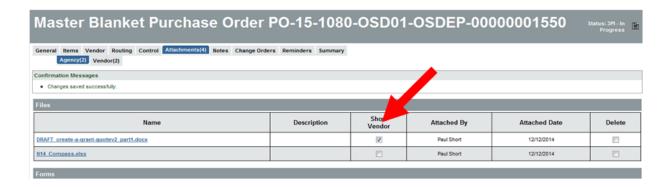
Department contract managers have the ability to control which documents associated with a procurement are visible to system users.

Purchase Order (PO) Attachments

After contract award and during the process of creating and sending a Purchase Order (PO), Department contract managers select which documents associated with the procurement will be brought through to the PO.



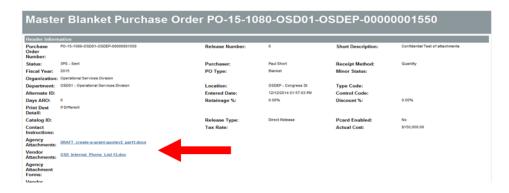
At this point, on the **Agency** sub-tab of the **Attachments** tab, the Department may uncheck the "Show Vendor" check box associated with an item that they do not want visible to the vendor or others not authorized to use the contract.



Controlling What is Visible in COMMBUYS: Guidance for Bid Attachments (continued)

Once the PO moves to "Sent" status, those files will be visible only to the Department contract manager and any other personnel authorized to use the contract.

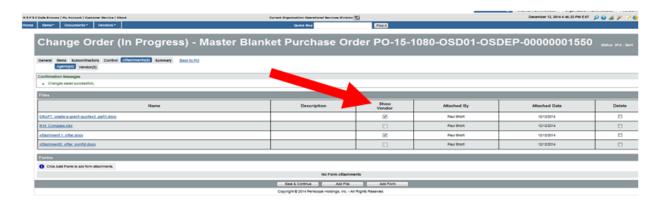
The screen image below illustrates the public view of the PO in "Sent" status. In this image, documents uploaded by the Department with the "Show Vendor" box unchecked are not visible.



Procurement File Attachments

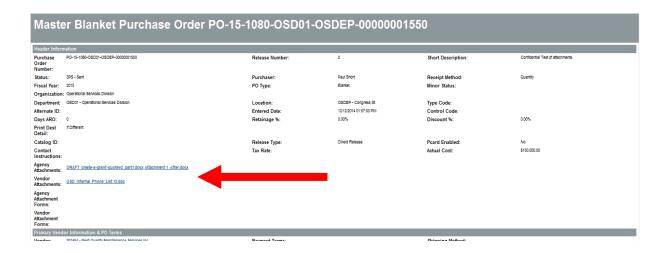
Departments may need to add a vendor and associated procurement file documents to COMMBUYS subsequent to contract award. Departments may process a PO change order to add documents to a contract at any time.

When adding attachments, Departments again have the opportunity to uncheck the "Show Vendor" check box to keep those files out of public view. The screen image below shows the attachments being added to a Master Blanket PO (i.e., a contract) and the "Show Vendor" check box.



Controlling What is Visible in COMMBUYS: Guidance for Bid Attachments (continued)

Once the change order is approved, unchecked files will not be visible to anyone except the Department contract manager and any other personnel authorized to use the contract. The screen image below illustrates the public view once the change order is approved. Only Agency documents marked with "Show Vendor" are visible.



What COMMBUYS Users See

What the Vendor Sees

Vendors cannot see any contract attachment for which the Department has unchecked "Show Vendor."

What the Public User Sees

Public COMMBUYS users cannot see any contract attachment for which the Department has unchecked "Show Vendor."

What the Contract Owner and Authorized Contract Users See

The Department contract owners and those authorized to use the contract can see all attachments, including those not visible to the vendor or public user.



Additional Guidance on Bid Attachments in COMMBUYS

Many procurement officers are accustomed to attaching forms to bids when preparing to post them. The way we use forms and the forms themselves have evolved over time with new considerations added by requiring electronic quote submission in COMMBUYS. Basic purchasers are encouraged to review their current use of forms as attachments to bids with the following guidance mind.

Ensure you are using the latest versions of the forms. Up-to-date forms and other standard documents are available on the OSD Forms webpage. Visit mass.gov/osd and select OSD Forms under Key Resources.

Do not attach outdated forms and documents. Certain forms no longer are required, or have been incorporated in the Standard Contract Form, and should not be added as separate attachments to bids. Examples of obsolete forms include:

- Affirmative Action Policy Statement,
- Affirmative Action Statement Language and Guidance,
- · Consultant Contactor Mandatory Submission Form, and
- Northern Ireland Certification

Be clear when explaining what you expect bidders to do with the forms. For each form you attach to a bid, provide a clear explanation of the use of each form and specify which forms you expect a vendor to submit with their quote. For example, you may decide to attach all three Supplier Diversity Program (SDP) forms (SDP Plan Commitment, Declaration of SDP Partners, and SDP Spending Report). In this example, the RFR should explain to vendors that only the SDP Commitment form is required to be returned with the quote. The RFR also should state that the other two forms are being provided for informational purposes only and will only be required if the bidder is awarded a contract.

Get wet signature forms only from apparent successful bidders. As part of the electronic quote process, COMMBUYS will require bidders to certify agreement to the terms of standard boilerplate contract forms attached to the bid (e.g., Standard Contract Form, Massachusetts W-9, Commonwealth Terms and Conditions, etc.) as a condition of submission of their quote. Consequently, Departments do not need to mandate submission of scanned or wet-ink copies of these forms with the quote. Any of the required documents for Vendor registration in MMARS (for the VCUST vendor customer file VCC or VCM) or other contract documents that require wet signature will be required to be submitted upon selection and award of a contract. More on this topic is available in the COMMBUYS Policy document available on the OSD website at www.mass.gov/osd under Key Resources.



Creating Qualification ("No Charge") Bids in COMMBUYS

COMMBUYS allows purchasers to solicit qualification materials and/or complex pricing documents from vendors (bidders) as attachments without entering prices directly into the system. While purchasers still will be required to create at least one item for the bid, they will be able to issue additional instructions in the RFR and in the bid Item to enable bidders to submit a non-price quote or a quote with pricing as an attachment.

If the quote does not involve an actual price, bidders should be instructed either to enter \$1 into the Item, or check off the "No Charge" box that also is available to bidders as an option. Once that action is taken, bidders will be able to upload qualifications and other documentation as attachments and submit a valid quote.

We recommend including the following language in the RFR and in the bid Item(s):

- In the RFR submission instructions: "Special instructions for quote submission: When preparing a quote in response to this bid, on the Items tab of the quote, bidders will be required to check the "No Charge" box to create a valid quote and then upload all requested bid documentation as attachments on the Attachments tab. The "No Charge" selection will not be construed by the purchaser to mean an offer to provide services or products at no charge."
- In the item: "[Name of the item / item description]. To submit a quote in response to this bid, bidders must enter "No Charge" for this item and upload all requested bid documentation as attachments."



Tip 2-10

"Restricted" or "Unrestricted" Bids? Always "Unrestricted"

The Bidders tab also provides basic purchasers an option to designate their bids as Restricted or Unrestricted. Purchasers must either leave that selection blank or select the Unrestricted bid option.

A step-by step review of the process for adding vendors to a bid can be found on the OSD website in the <u>How to Add Bidder Notification to a Bid Posting</u> job aid. Go to mass.gov/osd > OSD Training > Job Aids for Buyers.



Enabling Complete and On-Time Responses to Bids in COMMBUYS

During peak periods, the OSD Help Desk receives a high volume of calls from sellers seeking assistance as they submit bid responses. In an effort to meet expectations and ensure vendors are able to successfully submit their responses on time, we suggest agencies do the following:

- Set a bid opening date/time that falls on a **Tuesday**, **Wednesday**, **or Thursday** with a deadline of **4:00 p.m. or earlier**. Sellers often contact the Help Desk close to bid opening deadlines, which often occur during peak calling periods. Setting bid opening dates/times during lower call volume periods ensures sellers receive the level of support they need. Please note: Help Desk hours are 8:00 a.m. to 5:00 p.m., Monday through Friday.
- Include the <u>Create a Quote in COMMBUYS Job Aid</u>* when you post your bid. While this job aid is available to sellers to reference online, including it with your bid documents will ensure that sellers have the information they need at their fingertips.
- If a seller seeks more information, refer them to the webcast*, How to Locate and Respond to a Bid in COMMBUYS. This reference tool will familiarize vendors with COMMBUYS terminology and basic navigation, and will provide guidance for locating bid opportunities in COMMBUYS and submitting an online quote. Additionally, instructor led training and webinars for Locating and Responding to COMMBUYS Bids* are available to sellers.

^{*} Buyer Job Aids, Webcasts, and other training opportunities are available on the OSD website, www.mass.gov/osd > OSD Training.



Tip 2-12

Size Limit on Attachments

COMMBUYS does not have any system limits on the size of attachments. Any size bid response or document may be attached to a COMMBUYS document. However, when designing Commonwealthgenerated attachments, please consider the capacity limits of vendor networks, particularly smaller vendors, and take care to optimize the size of attachments and the expected response documents to ensure vendors can download and upload the larger attachments without issue.



Tip 2-13

Posting Score Sheets in COMMBUYS

COMMBUYS requires the entry of an award recommendation, but it is up to the department's discretion as to whether they will post summary or individual evaluation score sheets in COMMBUYS. Regardless of whether they are posted in COMMBUYS, evaluation summaries and score sheets are subject to Public Records Requests.



Ensuring Proper Vendor Notification on Bids and RFQs

When preparing bids and RFQs, purchasers need to take action to notify vendors of opportunities that match their areas of interest.

Selecting vendors to notify is done on the Bidders tab. On the Bidders tab/General sub- tab, basic purchasers should click the "Lookup & Add Vendors" button which will open a Vendor search screen. At the bottom of the search screen, click the button "Find Vendors for All Commodity-EPPs on the Bid" to return search results for vendors who registered using the corresponding UNSPSC code. The purchaser then must select **all** of the vendors who appear in the search results and "save" them to the bid record, without deselecting any of the vendors in the search results. Only the vendors who appear on the Bidders tab will be notified of the issuance of the bid.

Additional Guidance:

- The **minimum requirement** is to notify all vendors who registered in COMMBUYS using the same UNSPSC code(s) as the ones used to set up the bid items.
- Buyers do not need to limit themselves to meeting only the above minimum requirement and are encouraged to conduct multiple searches for vendors registered under related UNSPSC codes.
- All vendors who subscribed to UNSPSC code(s) relevant to the bid should be notified. Purchasers
 should not remove vendors from notification lists based on assumptions about the vendors'
 capability to provide products or services sought in the bid, nor based upon history of doing
 business with a specific vendor.
- Buyers should not add individual vendors to notification lists based on history of doing business.
 Instead, they may look up UNSPSC codes used in registrations by qualified vendors and notify all vendors who are registered under those UNSPSC codes.



Accepting Paper Quotes

An agency exposes itself to certain risks if it accepts both electronic and paper quotes. Should you request paper quotes in addition to the official electronic quote, you must have standards in place to ensure that the documents are the same and that they both arrive by the quote submission deadline. If the electronic and paper quotes are different or you allow the paper quote to be submitted after the electronic quote deadline, this will expose your agency to unnecessary risks that may be eliminated by only accepting electronic quotes. As such, OSD recommends accepting electronic quotes only.



Multiple Contacts in COMMBUYS for Large Vendor Organizations

Buyers have inquired about setting up multiple contacts for vendors. COMMBUYS allows large vendors to designate multiple contacts by creating Associated Organizations under the same Tax ID. Associated Organizations may establish their own users, profile, and organization details. For example, large vendors with different business units or regional offices, each with their own contact and knowledge to do business with the Commonwealth, could establish an Associated Organization for each unit or region. The vendor representative selected to manage the business' set-up in COMMBUYS, known as the "Seller Administrator," will need to initiate the process to set up Associated Organizations. The process is as follows:

The Seller Administrator must log in to COMMBUYS and click the "Add Associated Organization."



This opens an email notification page where the Seller Administrator enters the email address of the "associated" vendor user. In addition, the Seller Administrator may add a message in the Text field. When complete, click **Send.**



An email is forwarded from COMMBUYS to the "associated" vendor along with a link that the new associated vendor user will follow to register in COMMBUYS and create a new organization. The "associated" vendor will now be able to register as a COMMBUYS Vendor using the link provided in the email, which allows them to bypass the Tax ID information.



Departmental MBPOs Posted as Statewide Contracts in COMMBUYS

When setting up a Departmental (also referred to as Non-Statewide / Limited User) contract in COMMBUYS, Departments must restrict the use of that contract to their organization and other organizations specified in the RFR (if any).

Some Departments have inadvertently set up Departmental contracts with an "All Org" selection in COMMBUYS, essentially setting up a Statewide Contract. Statewide Contracts may only be established by the Operational Services Division (OSD), or by a Department with OSDs written approval.

Checking Departmental MBPO Settings

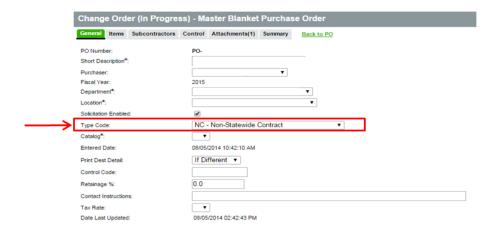
When setting up contracts in COMMBUYS, there are two areas where purchasers must identify whether the contract is a Non-Statewide / Limited User Contract or a Statewide Contract.

- 1. On the **General** tab, the **Type Code** should be **NC** for a Non-Statewide Contract/Limited User Contract, not SW, which is reserved for Statewide Contracts.
- 2. On the Summary tab under the Master Blanket/Contract Controls section, the MBPO should reflect only the issuing Department/Organization that owns the MBPO and other organizations that have been granted use of the contract and were listed specifically in the RFR or defined generally in the RFR. (See <u>COMMBUYS Use Policy Document</u>, 8.8.2). The "All Org Master Control" option should not be selected for Departmental Contracts.

Correcting Departmental MBPOs Settings

To make corrections to a Departmental MBPO, process a Change Order.

 On the General tab, change the Type Code to NC – Non Statewide Contract. Click Save and Continue.

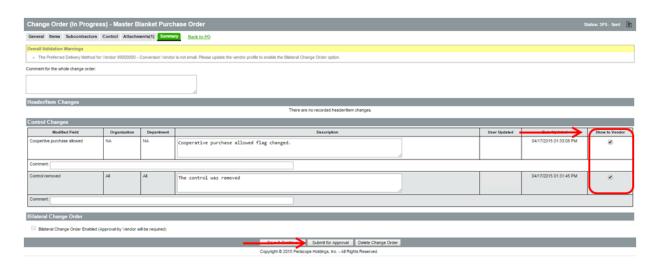


Departmental MBPOs Posted as Statewide Contracts in COMMBUYS (continued)

- 2. Under the Control tab, refer to the line that lists "All Org Organization Umbrella Master Control." Select the check box under the Delete Column, and click Save and Continue.
- 3. Next, <u>if no other organizations have been granted use of the contract</u>, uncheck the **Cooperative Purchasing Allowed** check box, and click **Save and Continue**.
- 4. Review to ensure all Organizations/Departments that <u>are</u> eligible to purchase from this MBPO are set up to do so.



- 5. On the **Summary** tab, uncheck the **Show to Vendor** option. This avoids a notification email going out to vendors as a result of this internal settings change.
- 6. Submit for Approval.



7. Once approval is received, **Apply** the **Change Order**.



Canceled Bids/MBPOs

In COMMBUYS, if a bid owner cancels a bid or MBPO, it is no longer viewable in the public view or buyer logged-in view, except by the record owner.



Protecting Confidential Documents Posted in COMMBUYS

Buyers must be mindful that all files associated with an awarded bid, **files submitted by awarded vendors and those that were not awarded**, are publicly accessible through COMMBUYS after bid evaluation unless they are marked as confidential. As a best practice when issuing bids, buyers should post copies of standard forms for vendor review and agreement in their quote submissions, and require actual submission of standard forms that include confidential information, **only upon contract award**.

Designating Documents as Confidential during Bid Evaluation

During the bid evaluation process, buyers must review all vendor quote attachment files to ensure documents that contain confidential information have been designated as confidential by the submitting vendor. Examples would include documents that contain tax identification numbers or other security-sensitive data. In the illustration below, the vendor has **not** selected the **Confidential** check box.



Protecting Confidential Documents Posted in COMMBUYS (continued)

If a buyer encounters a submitted document that should have been designated as confidential, but was not labeled as such by the submitting vendor in COMMBUYS, the buyer should seek a quote revision. Guidance for this process is included in the Requesting Quote Revisions Job Aid, mass.gov/osd > OSD Training.



Guidance to Include in RFR Documents: Bid Opening Date/Time

The Operational Services Division (OSD) is encouraging buyers to include additional guidance about **Bid Opening Date/Time** in their RFR documents to help vendors allot sufficient time when entering their quote submissions in COMMBUYS. The suggested language is as follows:

As you review the details of the bid in the RFR document, please take note of the assigned **Bid Opening Date/Time** and be mindful that buyers can only consider bid responses that are **complete** and have been **submitted in COMMBUYS** by the specified **Bid Opening Date/Time**.

The COMMBUYS system date and time is displayed in the top right corner of the COMMBUYS dashboard. Once the system time passes the **Bid Opening Date/Time**, the ability to submit a quote is <u>disabled</u>. Even if a vendor is in the process of <u>entering</u> the quote submission, their ability to submit the quote ends after the **Bid Opening Date/Time** has elapsed.

As such, please allot sufficient time to submit your quote response.



Cloning Bids for Open and Rolling Enrollment

COMMBUYS offers buyers the facility to clone existing bids to simplify new bid setup. This feature is available for Open and Rolling Enrollment bids, as well. Buyers should be advised, however, that if a cloned bid was not previously set up for Open and Rolling Enrollment, buyers will need to proactively enable this feature if the procurement is utilizing one of these enrollment options. Please review the **General** tab of your cloned bid to be sure the enrollment options and response deadlines are set up to match those listed within the RFR.



Buying a Product or Service Not Listed in the Vendor Catalog

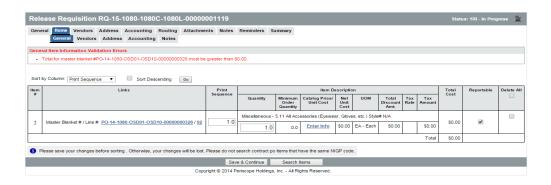
When purchasers are unable to find a specific product or service among the line items of a vendor's catalog in COMMBUYS, purchasers may use the generic/miscellaneous line item, if available. Such generic/miscellaneous line items will have a \$0.00 price associated with them, and purchasers will be able to enter the actual price when they create a requisition or PO using such a line item.

Tips for using generic/miscellaneous line items:

- 1. Check if the product or service you are planning to buy is included under the contract. Some contracts only allow purchasers to buy items listed as line items in the vendor's catalog in COMMBUYS. In cases where line item descriptions are phrased very generally (e.g. names of contract categories), the Contract User Guide or vendor price list attached to the MBPO may contain information on specific products and services included in (or excluded from) the contract.
- 2. If the contract covers products or services not specifically listed as line items, locate a generic/miscellaneous line item for ordering. When adding line items to a requisition, perform an Item Search using the contract number in the Description field and sort the search results by Unit Cost. In some cases, using the word "miscellaneous" in the Item Description will narrow the search results.

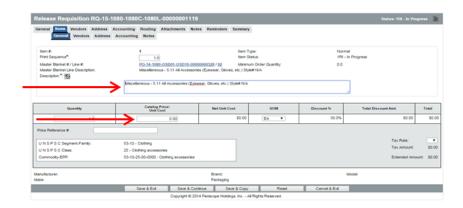


3. Add the line item to the requisition and enter the description and price. Once the item has been added to the requisition, use the hyperlinked Item # on the left side of the screen to edit the Catalog Price/Unit Cost and item Description to match the product or service you are buying. Additionally, purchasers may use the Enter Info link for the item to enter the item price.



Buying a Product or Service Not Listed in the Vendor Catalog (continued)

Edit the **Description** field and enter the Catalog Price/Unit Cost, as needed. Select **Save and Continue**.



4. If necessary, attach additional information on the product or service you are buying. Purchasers also have the option to attach the vendor's price proposal and/or other materials to the Requisition or PO to provide additional information to the vendor.

If a \$0.00 or miscellaneous line item does not exist in the vendor catalog, contact the Strategic Sourcing Lead (SSL) associated with that contract. SSL contact information is available in the Contract User Guides at www.mass.gov/osd > Buy from a Statewide Contract > Contract User Guides.

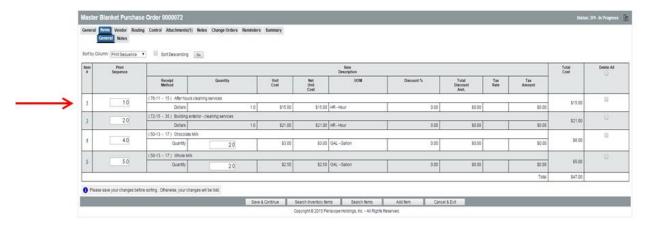


Cloned Documents that Require Modification

Some users have experienced a system error after using the clone function and making modifications to their original document.

If additional items are added to a cloned document, preparers are cautioned to review the document to ensure there is no duplication of **Print Sequence** numbers. Duplication will cause a system error when submitting the document for approval.

The **Print Sequence** field is editable by selecting the **Item Number**.



Change the **Print Sequence** number and adjust the **Description**, if needed. Click **Save and Continue**.





Changes to Documents Submitted for Approval

Buyers have the ability to make changes to documents after they have been approved. The process varies based on the document type.

Changes to Requisition Documents

The approver may disapprove the document, returning it to the originator. The originator reopens the document, putting it into an "In Progress" status, and has full rights to make edits to the document, as needed. Once changes are complete, the document is resubmitted for approval.

Changes to Purchase Order Documents

A Release Purchase Order Document in a "Ready to Send" status may be changed by initiating a Change Order using the **Change Order** tab. Once the required changes are made, the Release Purchase Order is resubmitted for approval.

Please note: Changes to a Purchase Order from a PunchOut catalog are not permitted. If amendments to the original record are needed, the purchaser should cancel the original Purchase Order and initiate a new requisition.



Approval Path Flexibility

Approval paths for an Organization are set up and maintained by the Organization Administrator and may be changed or inactivated, as needed. There are several COMMBUYS features that allow Organizations to tailor their approval structure to meet business demand:

- •Both Basic Purchasers and specified Department Access users may be appointed as approvers on an Organization's approval paths.
- •Departments are no longer restricted to having one primary and one alternate per approval path level. For every primary approver on an approval path, COMMBUYS allows for multiple alternates.
- •In isolated situations where an additional approver is requested on a document, an approver may be manually added by one of the users listed on the designated approval path. Guidance for manually adding approvers is available in the Approving Documents in COMMBUYS Webcast at www.mass.gov/osd > OSD Training > Buyer Webcast Trainings.



Turn Browser Pop-Up Blocker OFF for Punch Out Catalog Shopping

To take advantage of the COMMBUYS feature supporting the purchase of goods from vendor Punch Out catalogs, remember to turn off the pop-up blocker in your browser. COMMBUYS is supported by most standard browsers, including Internet Explorer, Firefox and Safari. Because of the unique way Google Chrome manages menus and pop-ups, COMMBUYS features will not work properly with Chrome.



Tip 3-6

Edits to Requisitions Converted to a PO or Bid Not Required

Once a requisition has been converted to a Purchase Order (PO) or Bid, it is not necessary to go back and edit that requisition. The PO or Bid is the document of record.



Tip 3-7

Canceled Documents

Although documents may be canceled in COMMBUYS, they will not be deleted from the system. Canceled documents remain part of the COMMBUYS record.



Tip 3-8

Attaching Multiple Documents

As a best practice, users needing to attach multiple documents are advised to upload one document at a time. This practice allows for easy identification and download of documents, and facilitates the exchange of new document versions.

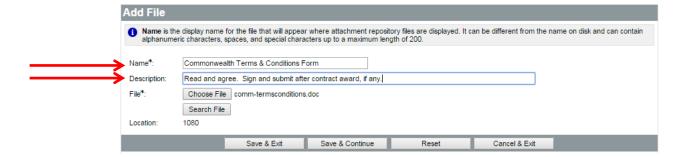


Editing Attachment Names in COMMBUYS

Prior to uploading an attachment in COMMBUYS, purchasers should assign a file name that will easily identify its contents. When a file is uploaded, the attachment file name will appear in the **Name** field and will serve as the default wording for the link to this document within the Attachments section of the requisition, bid, or PO in COMMBUYS.



Purchasers have an opportunity to change the file name at this time by editing the **Name** field to make the link to the attachment more user-friendly. This will not change the file name – just the wording of the link to the file. Purchasers also may add brief instructions related to the use of the file in the **Description** field.



Click **Save & Exit**. Once uploaded in COMMBUYS, file names may not be changed. The user may choose to delete the file and reload in COMMBUYS.

Editing Attachment Names in COMMBUYS (continued)

The attachment file will appear without instructions on the **Summary Tab** and in the public view.



Instructions will appear on the **Attachments Tab** when logged in to COMMBUYS.

Files					
Name	Description	Show Vendor	Attached By	Attached Date	Delete
Commonwealth Terms & Conditions Form	Read and agree. Sign and submit after contract award, if any.	•	Dmitriy Nikolayev	03/04/2015	



Revisions to PunchOut Requisitions

PunchOut catalogs enable buyers to search for items and make their selection using a vendor's online catalog. When purchasing via a Punch Out catalog, buyers select the shopping cart icon on the top right portion of the screen and make their selections in the vendor's online catalog. Once purchases are finalized, the selections are pulled back in to COMMBUYS and automatically summarized on a requisition.



It is important to note that **once the purchaser has left the vendor's online catalog, changes to the order no longer are possible**. If modifications are required, the purchaser needs to cancel the existing requisition and reenter their selections in the vendor's online catalog.



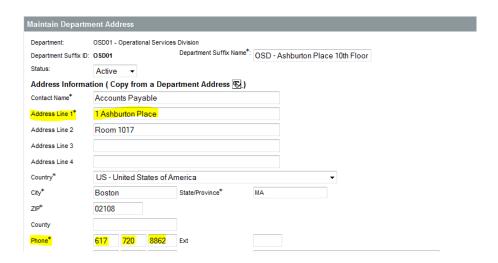
Review Department Information to Ensure Timely Processing of Orders

When buyers initiate a purchase order, whether through internally hosted catalogs in COMMBUYS or through a vendor's online PunchOut catalog, the Department's address and telephone information are provided to the vendor along with the order information. Because of this process, it is critical that address and telephone information are complete and accurate.

The COMMBUYS Operations Team frequently fields issues related to catalog orders being rejected by vendors due to incomplete or inaccurate Department information. As such, Organization Administrators (OAs) are encouraged to review their Department's record in COMMBUYS, validate the Department's information, and take action to update the record, when necessary.

In particular, OAs should ensure that:

- all mandatory fields on the Maintain Department Address screen are complete and accurate;
- Department name and/or Department contact information are placed in the Contact Name field and not in the Address Line 1 field;
- the Address Line 1 field should not contain a P.O. Box or forwarding directives (Attention: Susan). OAs are encouraged to format street addresses using a numeric value (5, not five);
- Many vendor systems only are able to accept two lines of address information. Therefore, OAs should ensure that Address Lines 1 and 2 provide valid street/delivery information;
- an accurate phone number is provided. Phone numbers that contain all 0s or 9s are not valid.





Creating a Favorite List in COMMBUYS to Expedite Recurring Purchases

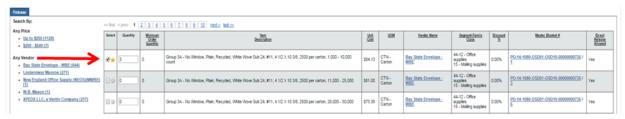
Purchasers have the ability to maintain a list of frequently used catalog line items in COMMBUYS.

Use this guide to:

- Add catalog line items to your Favorite List in COMMBUYS; and
- Use line items on your Favorite List to make purchases.

Add Catalog Line Items to Your Favorite List

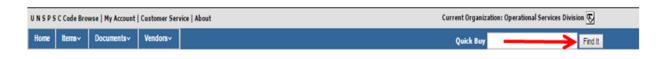
Purchasers may identify a frequently used catalog line item as a favorite by selecting the "star" icon to the left of the desired line item.



Click Save and Exit.

Use Line Items on Your Favorite List to Make Purchases

To initiate a purchase from your Favorite List, select the **Find It** button at the top of your navigation dashboard.

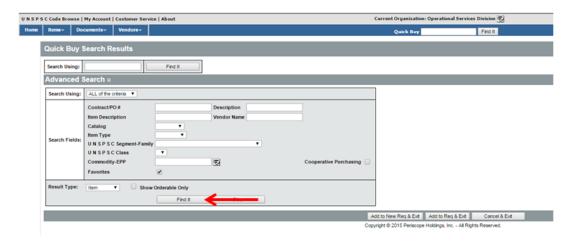


Next, select the toggle button (+) to the right of **Advanced Search**.



Creating a Favorite List in COMMBUYS to Expedite Recurring Purchases (continued)

Select the Favorites box and click Find It.

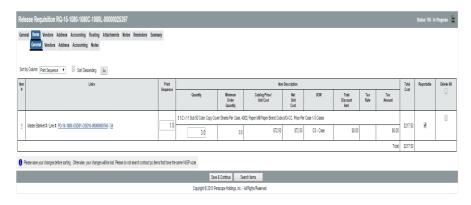


This action will return a list of catalog line items you have favorited in the past. Select the desired line item and enter an amount in the **Quantity** field.



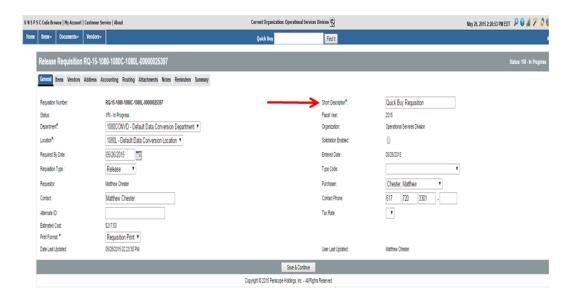
Select Add to New Req & Exit.

The selected item(s) are summarized on the **Items** tab of the requisition.



Creating a Favorite List in COMMBUYS to Expedite Recurring Purchases (continued)

On the **General** tab, the **Short Description** field will pre-populate. Enter an appropriate description.



Click Save & Continue.



Enabling PunchOut Purchases Using Internet Explorer

To utilize PunchOut functionality in COMMBUYS, buyers must enable pop-ups in their browser. The COMMBUYS Help Desk frequently receives questions from Internet Explorer (IE) users about setting browser permissions to allow PunchOut purchases.

To allow PunchOut purchases using IE, launch your IE browser. Depending on your version of IE, select either **Tools** or the **Gear** button to open the **Internet Options** window.

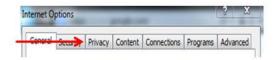




^{*} COMMBUYS is supported by most standard browsers including Internet Explorer, Firefox, and Safari. Because of the unique way Google Chrome manages menus and pop-ups, COMMBUYS features will not work properly in Chrome.

Enabling PunchOut Purchases Using Internet Explorer (continued)

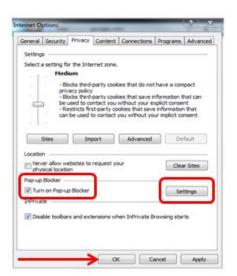
In the Internet Options window, select the Privacy tab.



Here users will have two options. Users may choose to allow <u>all</u> pop-ups by unchecking **Turn on Pop-up Blocker** and clicking **OK**;

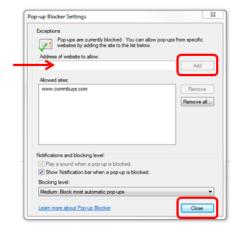
OR -

Users may specify sites where pop-ups are permitted. To enable pop-ups for COMMBUYS.com, check **Turn on Pop-up Blocker**, and select **Settings**.



In the **Pop-up Blocker Settings** window, enter www.COMMBUYS.com in the **Address of website to allow** field. Select Add and then Close.

Close and reopen Internet Explorer before using COMMBUYS PunchOut functionality.





Save Your Work

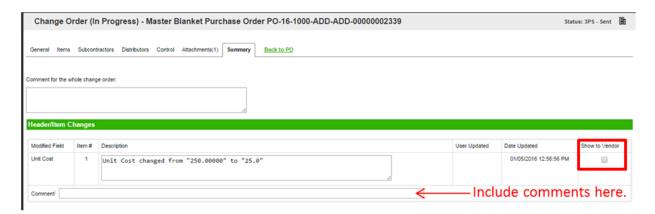
Buyers are encouraged to regularly save their entries as COMMBUYS has a prescribed 30-minute autosession timeout. A session will time out if a buyer has not elected to save their work (i.e. selecting Save and Continue), or has not navigated to another tab within that 30-minute period.

<u>Please note</u>: The same 30-minute auto-session timeout applies to buyers making purchases in a **PunchOut catalog** or typing answers in the **Question and Answer** tab: buyers must save their entries within the 30-minute time span or risk losing their work.



Change Orders and Vendor Notifications

When processing a Change Order in COMMBUYS, buyers are provided the option to forgo vendor notification by <u>unchecking</u> the **Show to Vendor** box on the **Summary** tab of the Change order. When making this election and choosing to include comments as part of the Change Order, buyers <u>must</u> use the **Comment** box provided at the <u>item level</u>, i.e. the section that contains the **Show to Vendor** checkbox. Comments entered in the **Comment for the whole change order** box at the top of the screen will prompt an email to the vendor even if the **Show to Vendor** box is unchecked.



Section 4: COMMBUYS Resources

COMMBUYS Resource Center

Have you visited the COMMBUYS Resource Center lately? Visitors may easily access instructional webcasts and job aids on recurring buyer activities, find current policy information and needed forms, and link to OSD's current training schedule for buyers. It's a great one-stop-shop for fast access to useful information. Find the Resource Center on the OSD website, www.mass.gov/osd/commbuys.

COMMBUYS Help Desk

Help Desk assistance is available from 8 a.m. to 5 p.m. ET, Monday through Friday.

• Email: COMMBUYS@state.ma.us

Phone: 1-888-627-8283



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